



TO: Shauna King
FROM: Jeff Grimshaw
DATE: 20 May 2008
RE: Feedback from the May 15 Management Team Meeting

As part of our commitment to effective communication, we want to highlight the following feedback from the Management Team meeting held on Thursday, May 15. We gathered confidential feedback from 20 attendees, and identified the following themes from their comments. Selected supporting verbatim comments representative of the themes were pulled out from the interview data.

Good News

- ▶ Overall, the responses were overwhelmingly positive. When asked how the meeting went in general, comments included, “awesome,” “inspirational,” and “very effective, very productive.”
 - *Overall, it was very effective, inspirational...I was really captivated and at the edge of my seat.*
 - *This retreat was helpful in terms of level setting, getting the whole management team to understand the same amount of context and see the whole picture in a way that, for many people, was lacking before yesterday.*

There were a couple of respondents with negative feedback, but these were outliers and were not thematic.

- ▶ Many respondents said the main message was that F&A needs to change – they believe the transformation is beginning to take hold and they are making progress. They heard the need to bury the past; we can’t let it inhibit what F&A needs to do.
 - *Stop living in the past, move forward, time to execute.*
 - *We can’t use the past as a big weight around our necks any more. We need to bury it.*
- ▶ A number of people mentioned that they recognize the call to be leaders in communicating the transformation and its importance to across F&A.
 - *Main key message I took away was “you guys are leaders, start making this happen.”*
- ▶ Several realize that the Officers are committed to Shauna and she has support at the highest levels of the University.
 - *We have the support of the Officers, they would like to see progress, we should work together, we have a lot to celebrate, and we have more work ahead.*
 - *It was great seeing the responses from the corporate officers. Learning that Rick Levin and his direct reports are fully behind the transformation was really great information to have.*
 - *The Officers are supporting Shauna and this program and any doubts that the University might have had, knowing that revolving door position – the meeting served to put that to rest. Sounds clear that the University is behind Shauna and recognizes and supports the need for change.*
- ▶ A few respondents stated that they have a greater understanding of what the transformation is, why it’s necessary, and what it entails than they did before.
 - *On the whole, Shauna and her team are developing a much clearer and compelling message about what needs to happen.*

Items to Address

- ▶ While many understand the need to demonstrate how the work they do relates to the transformation and the Guiding Principles, a few stated that they need more help connecting their work to the big picture, both within F&A and Yale at large. Some mentioned the need to be clearer about what F&A leadership has charged them to do.



- *For the next retreat, I think we can go to another level of what does it mean in some of the major workstreams. For instance, what does it mean to be a process focused organization? What does it mean to manage metrics? We know that as a notion, but maybe it would make sense to have a combination of case studies and breakouts that almost are mini workout sessions that people can get their hands on different pieces and tools.*
- ▶ Several requested more detail about the transformation. They want to be informed about how their specific areas are affected by the transformation.
 - *I'd like to see more specifics. In general, we talk about the need for change, the University supports change. At my table, I asked specific participants what this means for their units and their departments. I didn't hear any answers.*
 - *The next meeting should include more details and recommendations on ISAP, TSRA, and the high performance organization. We need a finer level of detail about how these fit together and plans.*
- ▶ Although many said they appreciate the quarterly meetings, some would also like to have more regular updates on various projects, e.g. milestones and success stories.
 - *It's so valuable to be together as a team like that. I think the other thing I'd like to see is more progress reports. When Shauna showed us the front-and-back FY08 and 09 pages, that was a real eye opener. Every quarter, we get motivated and updated, but you wonder when you walk out of that room if stuff is going to get done. Want to be more kept up to date, maybe through other communications.*
- ▶ The Officer feedback was salient, and elicited a range of reactions.
 - *I think while the Officers have concerns, it also sounds like they're willing to make the investment and do it in a thoughtful way.*
 - *I'm not ready to talk about how badly we've been doing, I'm not ready to buy that it's been so bad. I'm not ready to acknowledge that. We all work hard to please our customers.*
- ▶ There were questions on how to communicate F&A related messages so it is meaningful to non-F&A affiliated audiences.
 - *It seemed very F&A centric. Seemed like there were two different audiences in the room. It wasn't a surprise to us that there were a lot of issues in F&A, but there wasn't a tie-in to the academic programs to me. There were a lot of F&A people who said they were shocked about how bad everything was. We weren't.*
 - *I would like to see more of the academic people so we can get the academic context, which is why we're here. It would help me to get my message right to my departments and it would help the F&A people who don't get exposure to them.*

Overall, the employees we interviewed felt the Management Team meeting was a positive experience and that the time was well spent. There continues to be an opportunity to provide greater detail about aspects of the transformation on an ongoing basis. Also, while managers feel committed to changing F&A, they are less certain about how exactly to communicate that to their teams; they want more instruction on “how to lead,” and “what to communicate.”

We will use this information to develop an approach for equipping managers to be more effective communicators and to inform how we design messaging for future retreats.